

Merlin
Business Software

Business Solutions

For Wholesalers, Merchants, Distributors



Merlin Business Software

Merlin Business Software is specifically designed to fulfil the changing requirements of Merchant, Wholesale, Stockist and Distribution environments, including sales order processing, stock control, invoicing, sales, purchase and nominal ledgers.

Users of Merlin enjoy a wide range of benefits through numerous user friendly features within the software. These include the ability to increase the value of each order by prompting the customer to order additional items from their online history. Improved profit margins on each order are also possible, due to the management of individual customer special prices.

Our expertise in electronically interfacing Merlin with other applications ensures that both customer and supplier EDI, XML and E-commerce requirements can be catered for. Offering a comprehensive range of support services, our customers enjoy a single source of supply when it comes to hardware and software requirements, including installation, cabling, training, on-going support and maintenance and, if required, software modifications and bespoke development.

It is this single-source responsibility that we believe is largely responsible for Merlin's success and long-term customer loyalty.

Increase the value of every order

by prompting your customers to order items from their on-line history

Improve the profit margin on each order

by comprehensive management of individual customer special prices

Reduce the amount of time needed to serve the customer

through the use of fast order processing solutions – serve more customers!

Save time through improved efficiency

throughout your business – saved time means additional profit!

Management Reporting

Merlin possesses comprehensive management reporting for all aspects of the business including sales, stock, profit & loss analysis and can support multi-company and multi-location businesses.

Its ability to integrate with third-party sales intelligence software makes this combination an extremely potent selling tool.

Merlin Overview

Helping You Win More Business

“ Having battled through the minefield of software and hardware providers, we found Chatsworth, who were helpful towards our needs, communicative and responsive. Installation was without hindrance and their continued support exceptional. ”



System Control

The entire Merlin suite of modules is governed by the System Control Module which co-ordinates and administers the flow of data and tailors the system to meet the requirements of the company and its individual users.

System Control ensures that data is entered and stored once only, but is available to all appropriate modules. This in turn avoids the possibility of duplicating data and avoids the complications involved in synchronising data where separate, unrelated systems need the same information.

For example, the data in the Stock Module is also accessed by Sales Order Processing, Production Control, Purchase Order Processing, Despatching and Invoicing and Goods Received procedures.

System Control also manages user access to the system, which programs they are permitted to access, which reports they may print and which options are activated.

A suite of control codes, an integral part of the System Control Module, provides tailoring of the system to the company requirements without the need for bespoke software.

For example, a control code would enable the ability to manage stock over multi depots; or whether cost prices/profit information needs to be displayed on individual salesmen's order screen. The System Control Module is therefore the nucleus of every Merlin system.

Optional Procedures Examples

- Order entry options
- Pricing options
- Discount options
- Payment methods
- Picking/Despatch
- Drawing control
- Free stock definition
- Stock costing options
- Bar coding options
- Payment terms options
- Delivery methods
- Goods received
- Invoice consolidation

Tailoring For Users

- Password access to system
- Personalised individual user menus
- User access restricted to data needed to perform their job

Data

- All data held in central database
- No duplication of information
- Simpler operation of system
- Simpler operator training

Operations Control Examples

- Serial number control for computer-generated documents
- Printer spooling
- Multiple depots
- Multiple bin locations
- Nominal links from other modules
- Contract review (manufacturing)
- Sub assembly ordering (manufacturing)
- Case quantities & returns (Wines & Spirits)
- Traceability options
- Invoice archiving

Management Control

Take Control

Management Reporting

The Report Writer provides Merlin users with access to data analysis on all areas. Greater managerial control comes from the creation of virtually any report at just a few clicks of the mouse. Reports can be run time and time again and the system automatically refreshes the data for up to the minute results.

As well as being able to create your own reports there are 24 standard reports available:

- Monthly Sales
- Customer Address List
- Customer Turnover
- Top Selling Products by Margin
- Obsolete Stock List
- Top buying Customers by Margin
- Intrastats
- Detailed Re-order List
- Customer Sales History
- Customer Stop List
- Age Debt Analysis – detail and summary
- Consolidated Shortage by Production Order
- GRN Accruals
- Supplier Address List
- Daily Order Intake
- Top Selling Products by Units
- Dead Stock List
- Customers not spending
- Stock Turnover
- Special Price List by Customer
- Supplier Purchase History
- Quotation Letters
- Product Group Analysis - by Customer by Salesman
- Customer Sales by Product Group drilled down to products in the group

Sales Analysis

Merlin's Sales Analysis provides information and analysis on the performance of the business's sales. Standard reports include:

- Sales by individual Customer and Customer Group
- Sales by Customer Group
- Sales by individual Product and Product Group
- Sales by Product Group
- Sales by Salesman
- Sales by Region or Territory

Sales Analysis

Combinations of reports are also available, enabling users to highlight not just the performing salesmen but where performance may be slipping. All too often companies remain unaware of where business is being lost.

Merlin's Sales Analysis module helps to identify these areas and helps to pinpoint which customers, products and salesmen need attention.

A Salesman's performance can be recorded and analysed on a daily, weekly, monthly and yearly basis. These performance reports do not just apply to how much each individual is selling but can analyse prospecting roles too. Targets for prospective calls, visits and quotes can be set against each sales person and then compared to the actual results which are compiled automatically from Merlin's integrated CRM features, such as Contact Management and Call Management Modules.

At the core of Sales Analysis is the Sales and Profit Margin Control Module. This enables the maintenance and management of gross profit margins for product groups and individual product lines. Once set to the required levels, a dynamic watch is maintained on all Sales and Purchase transactions, giving guidance and warnings where necessary to both management and operators alike if prices fall below or rise above the desired limits.



Stock Control

Merlin's Stock Module lies at the heart of the system, storing comprehensive details of the full product range.

The data held within the Stock Module is designed to help control costs and to assist in general and special sales pricing.

It offers facilities for costing, pricing and discounting, multiple locations and maintains a comprehensive history of all stock movements including sales, purchases and any other usage to highlight fast and slow moving lines and to reveal trends.

“ Barcoding has improved our despatching & enabled us to despatch twice as many orders with the same amount of staff. ”

Barcoding

Barcode scanning equipment is easy to use and can be operated by all levels of employee from storemen to machine operators. It provides a low-cost solution to the problems inherent in entering data, significantly enhancing reliability and cutting costs in the process.

Automated Goods Despatching

Time and accuracy to despatch customers orders can be improved dramatically with the use of barcoding. Merlin makes automatic sales order despatching and warehouse operations even easier. With very simple operation any member of staff with little or no computer experience can use it.

Automated Goods Received

When taking delivery of goods, all orders can be quickly identified and quantities checked using the barcodes and hand held readers.

Faxing, E-mailing and SMS Messaging

Designed to help users provide higher levels of customer service, Merlin can send:

- Quotations
- Copy Invoices
- Alerts & Messages
- Order Acknowledgements
- Statements

Merlin's automated messaging facility enables users to send documents without leaving their desks. For example, the accounts department can send Order Acknowledgements, Statements and copy Invoices whilst the buyer can send out Purchase Orders.

All this can be done immediately and without the delay and expense of having to use the photocopier or the fax machine, or involving other personnel. SMS text messages can be sent from the keyboard to customers or members of staff alike.

Stock Management

Improve Efficiency

Improved Control of Stock

- Stock Levels monitored and shortages highlighted
- Control of Batches - less stock wastage
- Economic Stocking Levels
- Monitor deliveries by date, supplier or product
- On-line Supplier Purchase History
- Stock Status Reports by Supplier
- Identify slow moving or redundant stock
- Purchase Order Processing/Works Order integration

Product Information to help capitalise on every Sales Opportunity

- Stock Availability
- Alternative Products
- Technical Notes "add on" sales
- Quantity Break Pricing
- On-line Customer Sales History
- Family Aggregate Discounts
- Special Customer Prices and Gross Margin calculations

Proof of Delivery

The Proof of Delivery Imaging interface allows the association of a graphics file containing a signature on a delivery note with it's respective order and invoice.

Disputed invoices can be resolved effortlessly for customers insisting upon proof of delivery. POD images can then be instantly displayed on screen at the touch of a button to help speed up the resolution of customer disputes.

POD signatures can be taken at the Trade Counter/Point of Sale and also by your delivery driver using Pen based terminals.

Van Routing

For companies with busy delivery schedules, customer orders can be allocated to a delivery route at the time an order is placed, giving the customer a more accurate date for delivery at the time of order.

By utilising the Van Routing facility you can manage the delivery of customer orders more effectively, promise more accurate delivery dates and be more efficient with delivery costs.

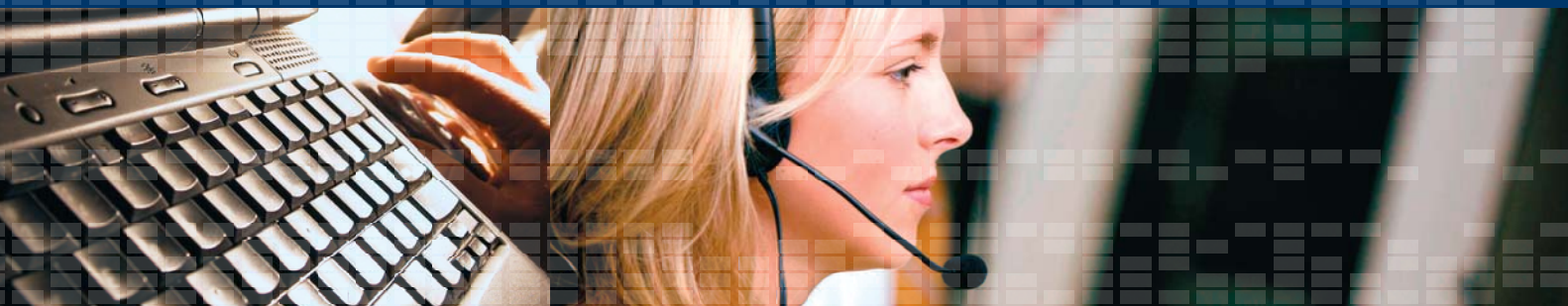
SMS Messaging

Contact your customers directly to let them know the stock they ordered has now arrived and is ready for collection/delivery.

Customer relationships are greatly improved with a simple SMS message to a customer's mobile telephone with information about the items they are waiting for.

Save your customer's time and keep them happy, they will come back to you time and time again!

“ The stock module has transformed the way we despatch our products - speed and accuracy have greatly improved. ”



“ Merlin helps us to sell more product lines per order, which significantly improves our profitability. ”

Comprehensive Sales Order Solutions

Merlin Business Software provides a solution for processing all types of sales orders:

- Back Office Sales
- Trade Counter Sales
- Trade Show Sales
- Pro-Active Tele-Sales
- Mobile Sales
- Showroom Sales

Increased Sales & Profits

Merlin is simple to use and provides all the many “ease of use” benefits you would expect from modern software including on screen guidance and many single-key options for the instant retrieval of information. Merlin will provide you with a more pro-active business system, which will enable you to:

- Increase your turnover and profitability whilst minimising costs
- Promote more pro-active tele-sales through the use of enhanced facilities
- Have immediate access to on-line sales history enabling operators to sell more product lines
- Control and manage Special Customer Prices automatically
- Control and manage Special Offers automatically
- Utilise a simple and easy to use Call Management system, which will provide a daily “To-Do” Screen for the tele-sales operators, detailing who they should call and at what time

Sales Analysis

Merlin’s Sales Analysis provides information on the performance of the business’s sales; enabling users to highlight not just the performing salesmen but where performance may be slipping, so action can be taken swiftly.

All too often companies remain unaware of where business is being lost – Merlin’s Sales Analysis module helps to identify these areas and helps to pinpoint which customers, products and salesmen need attention.

Sales & Pro-Active Sales

Increase The Value Of Every Order

“ Merlin is an excellent system for sales-led businesses. The sales data is limitless. ”





“ It is clear today that we are a more focused and efficient company since we have been running the Merlin Software. ”

Financials

Merlin provides comprehensive management information to assist in the day-to-day running of your business. All the financial data can be extracted in simple or detailed management reports.

The benefits Merlin gives to your financial operations:

- Multi-Company
- Multi-Branch
- Multi-Depot
- Multi-Currency
- Accounts & Budgets by department
- Operates over various computer platforms
- Access to all data - better management reporting - better control
- All ledgers automatically post to the Nominal Ledger

Gain simple and quick access to account details via rapid search facilities. User's menus can be tailored so levels of data access can be restricted by the management.

BACS Payments

Every Supplier who can/will accept payment electronically can be paid using a BACS payments file which can be transmitted to your bank using the majority of Online Banking Software. A suggested payments routine can be produced by Merlin and amended before being paid.

Credit Control

Credit Control information is readily available throughout Merlin, ensuring credit limits and overdue payments are tightly controlled. At any point of order entry, if the customer's limit is exceeded, the operator is alerted. A permanent lock can be applied requiring a manager override before an operator is allowed to enter the order, dependant upon the individual settings on the customer's account details.

Financials

Management Information

“ We were searching for a product that could help us improve every area of our business, from our trade counter to our accounts department. Each area needed to be linked to give our users access to important information quickly, with no fuss and with simple operation... we have found it! ”

Management Reporting

Merlin's Nominal Ledger has been designed to give users the means of producing a balance sheet, profit & loss account, trial balance and other financial reports, tailored to the needs of their particular business.

Merlin can provide many comprehensive financial reports as standard, ranging from statutory financial documents to detailed management information in the form of schedules and budgetary reports. There are many standard reports available within the sales and purchase ledgers for daily, monthly and annual routines: VAT, Reporting Profit & Loss and Balance Sheet reports.



“ Our business has grown significantly over the last four years and Merlin has kept pace. ”

Purchase Management

The Purchase Order Processing Module provides the facility to create Purchase orders quickly and easily, edit and retrieve information, match Supplier Invoices against receipts and automatically update the Nominal Ledger when Supplier Invoices are posted.

Relevant details are taken from the supplier and stock files and simultaneously updated, enabling you to manage your purchase ledger, nominal ledger and stock file in real time.

The Purchase Order Processing Module provides considerable help to the buyer, with on-line supplier history and by displaying the total cost as each line is completed. Finding existing orders is simple, even when the supplier can only quote their own internal order number. Where ISO 9000 quality assurance procedures require it, GRN “quarantine” procedures may be incorporated.

There are also options to automate data collection through the use of bar coding. These facilities can speed up time consuming routines such as receiving and labelling goods received, improving accuracy and eliminating the errors inherent in manual data entry.

Overview

A wide range of facilities are available to the operator, including:

- Input of purchase estimates, as well as purchase orders
- View supplier and stock files without leaving purchase order entry
- Access full purchase history for that supplier
- Enquire by part number, order number, invoice or supplier order number
- Update Contact Management
- Receipt stock against purchase orders
- Accept goods on approval

Merlin routinely checks and displays appropriate supplier record details, including current and aged balances, when a supplier account is accessed. As stock items are selected, relevant details are automatically presented including standard price, normal supplier discount, quantity on hand and on order etc.

Orders placed on the system can be easily retrieved, and the Order File Maintenance program provides facilities for displaying, amending, printing or cancelling orders. Added to this, the Order Reporting facilities give a wide range of options which relate to the status of orders.

Purchase Management

Control Your Costs

Simplicity

- Simple and quick access to accounts via alphanumeric search on account number, name, "name contains", postcode and telephone number
- Menus tailored to individual user needs: each user has access only to those parts of the system appropriate to his/her job
- Non-stocked or one-off items
- Quick Add facility for stock items not on file
- Conversion of a suppliers estimate to purchase order

Facilities

- Special pricing manual override
- Manufacturer's part number facility
- Link to appropriate sales order
- Link to appropriate works order number
- Extra description for invoice
- GRN approval option
- Copy estimate to other suppliers to obtain price quotes
- Search for existing order by:-
 - Order number
 - Account number
 - Our reference
 - Supplier reference
 - Part number
 - Memo
 - Sales order
 - Works order number

Prints/Reports

- Estimates/quotations requests
- Replicate quotation to alternative supplier(s)
- Purchase Orders - Print/Fax/Email
- Purchase Order Daybook
- Goods Received Notes
- Purchase Orders Report by Order No, Due Date or Account No
- Purchases by category or supplier
- Suggested Order reports by supplier with automatic order generation if required

On-Screen Information

- Contact names & telephone numbers
- Supplier notes
- Stock on hand, allocated, available etc
- Technical notes on products to help user order correctly
- Full supplier order history
- Running total value of order

Scope

- Multi-user
- Multi-company
- Multi-depot
- Multi-currency

Audit & Archiving

- Purchase Orders Day Book
- Individual transactions retained on file

Report Generator

- All data accessible to the user
- Comprehensive description of files & fields in user manual
- Enables user to create any non-standard report required



Training

A successful system that meets the needs of the user requires not only good software but also staff who are proficient in its operation.

Chatsworth Computers therefore provide a comprehensive range of training courses for all modules within the software suite.

One-day training courses on each module are held at Chatsworth House, in our fully equipped training facility. The courses include a set of training notes to take away, and each attendee is given a certificate on successfully completing the course.

“ We looked at several companies and finally chose Chatsworth’s Merlin System. Training, implementation and the transfer of data was easily accomplished, and Merlin has not disappointed us. ”

Benefits of Training

- Improves staff morale
- Gets the most out of your system
- Fewer operating problems
- Improves service to customers
- Objectives more readily achieved

Training & Support On-site

- For help when going live and during important milestones (e.g. year end)
- For those unable to travel

Training Facilities

- Modern fully equipped classroom
- Hands-on practice with terminal or PC
- Comprehensive course notes
- Certificate for successful completion of the course
- Expert instructors
 - Thorough knowledge of software
 - Commercial experience
 - Industry experience

Project Control

Merlin is a comprehensive system, which involves every aspect of business, from receiving an enquiry, negotiating and processing orders, purchasing or manufacturing products, despatching orders and the accounting processes, which these activities generate. It is therefore vital to ensure that the system provides a total solution to benefit all departments.

The groundwork for a successful installation is laid before the computer arrives, and then in the initial setting down process. It is essential that commercial experience, coupled with system know-how, is applied at this stage to ensure that the business derives the maximum benefit from its investment. Sound practical advice on all aspects of the system can save costly errors and disruptive revisions later.

Chatsworth Computers have a team of installation specialists whose task is to advise users how to obtain the best out of their Merlin system, particularly in the early stages. Each has considerable depth of commercial experience in different but overlapping areas which benefits both new users and those updating their existing systems.

Implementation/Training

As Important As The Software

Installation Planning

- Establishment of Steering Committee
- Type of network/multi-user system
- Cabling - type and routing
- Location of workstations
- Network security/access
- Data security
- Data conversion and transfer
- File set-up
- Opening balances
- Testing data
- Staff training
- "Go-live" on-site assistance

Advice on Pricing

- Quantity breaks
- Special customer prices
- One - off order discounts
- Family aggregate discounts
- Special offers

Forms Design

- Order Acknowledgement
- Despatch Note
- Invoice
- Statement
- Remittance Advice
- Cheques
- Job Cards/Time Sheets

Product & Account Codes

- Customer and supplier codes
- Stock codes
- Nominal codes

Stock Control Options

- Costings methods
- Issuing procedures
- Warehouse organisation
- Alternative products
- Manufacturers' product coding

Reporting

- Standard reports
- Management accounts
- Final accounts
- One-off reporting

Production Control Set Up

- Product build structures
- Job numbering
- Time booking
- Non-productive time
- Material issuing
- Inspections
- Progress chasing
- Traceability
- Quality control & ISO 9000 issues
- Job completion procedures
- Drawing Control

CHATSWORTH

C O M P U T E R S

Chatsworth House
Millennium Way
Chesterfield
S41 8ND

Tel: 01246 457150
Fax: 01246 457157
Email: info@chatsworth.co.uk
Web: www.chatsworth.co.uk